

Step-by-Step Instructions for Creating an Exception

Log in to OhioBuys. From any page in OhioBuys, go to the main menu navigation bar, click on **Suppliers**, and then select **Exceptions**.

The screenshot shows the OhioBuys Admin interface. The 'Suppliers' menu item is highlighted with a red box. Below it, the 'Exceptions' page is visible. The page has a search bar and filters for Keywords, Supplier, Contact, and Status. The Status filter is expanded, showing options: Draft, In Progress, Pending Resolution, and Pending Approval. There are also buttons for 'Search' and 'Reset'.

1

From the Exceptions page, click **Create Exception**.

[Create Exception](#)

2

Complete the following required fields under **Exception Details**. Required fields will be marked with a red asterisk:

The screenshot shows the 'Exception Details' form. The fields are labeled with letters A through F in red circles:

- A: Title *
- B: Description *
- C: Exception Type *
- D: Exception Sub Types *
- E: Severity *
- F: Creation Date *

Field F shows a date of 6/3/2019. There is also a checkbox for 'Urgent Request?'.

3

- a) **Title** – A name for the exception
- b) **Description** – A detailed description of the exception
- c) **Exception Type** – Describes whether the Exception is an issue with: Customer Service (used for both positive and negative exceptions), Delivery, Invoicing, Product, or Revenue Share (only used for negative exceptions, Revenue Share will be active in 2020)
- d) **Exception Sub Types** – Varies based on exception type
- e) **Severity** – High, Medium, or Low
- f) **Creation Date** – By default this will populate with today's date

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Specify the **Origin** of the exception, which describes who the exception is linked to.

- a) An exception must be linked to a **Supplier**. Once that Supplier has been selected a hyperlink will be established leading to the corresponding supplier record.
- b) Exceptions can be more specifically tied to a **Contract**, **Sourcing Process**, **Order**, **Delivery**, **Commodities**, and/or **Organizations** as appropriate. A hyperlink will also be linked to the corresponding contract record if a contract is linked.

The screenshot shows a form titled "Origin". It contains several dropdown menus. A blue box labeled "A" highlights the "Supplier" dropdown. A blue box labeled "B" highlights the "Contract", "Sourcing Process", "Order", "Delivery", "Invoice", and "Commodities" dropdowns. A blue box labeled "C" highlights the "Organizations" dropdown.

- c) Select the **Organizations** impacted by the exception.

▲ As you fill in certain fields in the **Origin** section of your exception, others may auto-populate. (e.g., after selecting a Contract, the Commodities associated with that Contract will auto-populate)

Click **Save**.

Save

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Review that the information contained in your exception is accurate.

- ▲ If you would like to send the exception to supplier for their input, click the **Supplier Input** checkbox.

☐ Supplier Input?

- ▲ If the **Supplier Input** checkbox is clicked, the exception will be sent to the Supplier after it receives Agency Exception Reviewer and Contract Analyst approval.
- ▲ To review what Supplier contacts will receive an exception, navigate to the **Contacts** tab. The **Contact Information** table displays all of a Supplier's contacts. An exception will be sent to any Supplier contacts that have the **Contract Contact** role. If there are no Supplier contacts with the **Contract Contact** role, then the exception will be sent to all Supplier contacts.

Contact Information					
Supplier	Contact Name	Email	Phone	Role	Contract Contact
#1 RADON TESTER	asdf asdf	aesdf@kal.com	278-009-8292	Contract contact	No
#1 RADON TESTER	Brandon Harsany	bharsany@radon.com	833-544-9080	Supplier admin	No
#1 RADON TESTER	Fred Flintstone	fflintstone@email.com	123-456-7890		No
#1 RADON TESTER	Radon Supplier	b@kll.com	1272828292929	Supplier admin	No
#1 RADON TESTER	Radon Tester	radon@tester.com	123-456-4651	Contract contact, Order Contact	Yes
#1 RADON TESTER	t t	trerer@yahoo.com	510-432-8967		No
#1 RADON TESTER	tes 123	test@test.com	283-299-0009	Order Contact, Supplier admin	No
7 Result(s)					✱

When you are ready to submit it for approval, click **Submit**.

Submit